

AMENDMENTS TO THE CLAIMS

This listing of claims will replace all prior versions, and listings, of claims in the application:

Listing of Claims:

- 1 1. (Currently amended) An apparatus for determining taxes that is
2 configurable for local jurisdictions, comprising:
 - 3 a tax knowledge base, embodied in a computer system, wherein the tax
4 knowledge base includes tax ~~rate~~ data pertaining to ~~taxes~~ ~~tax rates~~ in local
5 jurisdictions;
 - 6 an external tax service interface, embodied in ~~a computer~~ the computer
7 system, configured to interface to a third party tax service provider to perform tax
8 computations for another local jurisdiction which is simultaneously applicable;
 - 9 a tax rule base, embodied in ~~a computer~~ the computer system,
10 wherein the tax rule base includes one or more tax rules for
11 applying taxes in local jurisdictions, ~~and wherein the tax rule base is~~
12 ~~configured to receive tax rules and data in a markup language format or an~~
13 ~~electronic data interchange format, thus enabling a third party provider, a~~
14 ~~tax professional, or an end user to enter the tax rules and data in a machine~~
15 ~~readable format without requiring programming;~~ and
16 wherein the tax rules and the tax data comprise ~~at least a country~~
17 ~~name, a tax regime identifier, a tax identifier, a tax type identifier, and a~~
18 ~~tax jurisdiction identifier~~ tax jurisdiction; and
19 a tax determination manager, embodied in ~~a computer~~ the computer
20 system, ~~that is~~ configured to determine ~~a tax for a transaction~~ an applicable tax
21 ~~corresponding to at least the tax regime and the tax jurisdiction at a given level of~~

22 granularity, a taxable basis for the applicable tax, and a tax status for the
23 applicable tax using the tax knowledge base and the tax rule base.

1 2. (Original) The apparatus of claim 1, further comprising a tax rules
2 navigator that is used by the tax determination manager to navigate through rules
3 to return the result or reference to a result for a tax determination process.
1

1 3. (Previously presented) The apparatus of claim 1, further
2 comprising a tax rules navigator that can be used by processes of a given tax
3 service component, including the tax determination manager and a tax
4 administration manager.

1 4. (Original) The apparatus of claim 1, further comprising a tax
2 services request manager that is configured to access the tax determination
3 manager upon receiving a tax request from a registered subscriber.

1 5. (Original) The apparatus of claim 4, further comprising an open
2 subscription mechanism, wherein the open subscription mechanism includes
3 security and access protocols used by the tax services request manager to control
4 access to the tax determination manager.

1 6. (Original) The apparatus of claim 1, further comprising a record
2 repository, wherein the record repository stores information relating to tax events
3 and tax status.

1 7. (Original) The apparatus of claim 6, further comprising a tax
2 repository manager, wherein the tax repository manager is configured to store and
3 retrieve tax events and tax status to and from the record repository.

1 8. (Original) The apparatus of claim 1, further comprising a tax
2 configuration manager, wherein the tax configuration manager is configured to
3 update the tax knowledge base and the tax rule base.

1 9. (Original) The apparatus of claim 1, further comprising a
2 geographical model, wherein the geographical model is used to configure the
3 geographical boundaries of various jurisdictions associated with different tax
4 regimes.

1 10. (Original) The apparatus of claim 1, further comprising a trading
2 community model, wherein the trading community model represents various
3 parties, sites and locations involved in tax operations in a standardized format.

1 11. (Original) The apparatus of claim 1, further comprising a tax
2 administration manager, wherein the tax administration manager determines the
3 recoverability and the extent of recovery of a tax.

1 12. (Previously presented) The apparatus of claim 1, further
2 comprising a tax administration manager, wherein the tax administration manager
3 determines an amount to be settled with a tax authority for a given tax and a
4 calendar period specified by the tax authority.

1 13. (Previously presented) The apparatus of claim 1, further
2 comprising a tax administration manager, wherein the tax administration manager
3 interfaces with a payables system to enable the payment of a settlement amount
4 determined by another process of the tax administration manager.

1 14. (Previously presented) The apparatus of claim 1, further
2 comprising a tax administration manager, wherein the tax administration manager
3 provides a facility for reconciling the amounts in a record repository with that
4 existing in an accounting system.

1 15. (Currently amended) A method for determining taxes for local
2 jurisdictions, comprising
3 receiving a request to provide a tax for a transaction from a subscriber;
4 determining a ~~set of local jurisdictions~~local jurisdiction for the transaction;
5 accessing a tax rule base and a tax knowledge base,
6 wherein the tax rule base includes one or more tax rules for
7 applying taxes in local jurisdictions, and the tax knowledge base includes
8 tax data pertaining to tax rates in local jurisdictions, is configured to
9 ~~receive tax rules and data in a markup language format or an electronic~~
10 ~~data interchange format, thus enabling a third party provider, a tax~~
11 ~~professional, or an end user to enter the tax rules and data in a machine~~
12 ~~readable format without requiring programming;~~ and
13 wherein the tax rules and ~~the tax~~ data comprise ~~at least a country~~
14 ~~name, a tax regime identifier, a tax identifier, a tax type identifier, and a~~
15 ~~tax jurisdiction identifier~~tax jurisdiction;
16 calculating the tax for ~~each~~the local jurisdiction in the set of local
17 ~~jurisdictions~~ using ~~the~~ one or more ~~tax~~ rules from the tax rule base and ~~the~~ tax rate
18 data from the tax knowledge base, ~~wherein calculating the tax involves~~
19 ~~determining an applicable tax corresponding to at least the tax regime and the tax~~
20 ~~jurisdiction at a given level of granularity, a taxable basis for the applicable tax,~~
21 ~~and a tax status for the applicable tax;~~

22 using a third party service external to the system to perform tax
23 computations for another local jurisdiction which is simultaneously applicable;
24 and
25 returning the tax for ~~each~~the local jurisdiction to the subscriber.

1 16. (Original) The method of claim 15, further comprising:
2 determining a taxable basis from the transaction;
3 determining a tax status basis from the tax rule base;
4 determining a tax rate from the tax knowledge base; and
5 calculating the tax based on the taxable basis, the tax status basis, and the
6 tax rate.

1 17. (Original) The method of claim 15, wherein receiving the request
2 from the subscriber includes verifying that the subscriber is authorized to make
3 the request.

1 18. (Original) The method of claim 15, further comprising allowing a
2 user to update the tax rule base and the tax knowledge base, wherein updating the
3 tax rule base and the tax knowledge base provides current data for the method.

1 19. (Currently amended) A computer-readable storage medium storing
2 instructions that when executed by a computer cause the computer to perform a
3 method for determining taxes for local jurisdictions, comprising
4 receiving a request to provide a tax for a transaction from a subscriber;
5 determining a ~~set of local jurisdictions~~local jurisdiction for the
6 transaction;
7 accessing a tax rule base and a tax knowledge base,

8 wherein the tax rule base includes one or more tax rules for
9 applying taxes in local jurisdictions, and the tax knowledge base includes
10 tax data pertaining to tax rates in local jurisdictions, is configured to
11 receive tax rules and data in a markup language format or an electronic
12 data interchange format, thus enabling a third party provider, a tax
13 professional, or an end user to enter the tax rules and data in a machine
14 readable format without requiring programming; and

15 wherein the tax rules and the tax data comprise at least a country
16 name, a tax regime identifier, a tax identifier, a tax type identifier, and a
17 tax jurisdiction identifier tax jurisdiction;

18 calculating the tax for each the local jurisdiction in the set of local
19 jurisdictions using the one or more tax rules from the tax rule base and the tax rate
20 data from the tax knowledge base, wherein calculating the tax involves
21 determining an applicable tax corresponding to at least the tax regime and the tax
22 jurisdiction at a given level of granularity, a taxable basis for the applicable tax,
23 and a tax status for the applicable tax;

24 using a third party service external to the system to perform tax
25 computations for another local jurisdiction which is simultaneously applicable;
26 and

27 returning the tax for each the local jurisdiction to the subscriber.

1 20. (Original) The computer-readable storage medium of claim 19, the
2 method further comprising:

3 determining a taxable basis from the transaction;
4 determining a tax status basis from the tax rule base;
5 determining a tax rate from the tax knowledge base; and
6 calculating the tax based on the taxable basis, the tax status basis, and the
7 tax rate.

1 21. (Original) The computer-readable storage medium of claim 19,
2 wherein receiving the request from the subscriber includes verifying that the
3 subscriber is authorized to make the request.

1 22. (Original) The computer-readable storage medium of claim 19, the
2 method further comprising allowing a user to update the tax rule base and the tax
3 knowledge base, wherein updating the tax rule base and the tax knowledge base
4 provides current data for the method.

1 23. (Currently amended) A means for determining taxes that is
2 configurable for local jurisdictions, comprising:
3 a tax knowledge base means for providing tax ~~rate~~ data pertaining to ~~taxes~~
4 ~~tax rates~~ in local jurisdictions;
5 a tax rule base means for providing one or more rules for applying taxes in
6 local jurisdictions,
7 ~~wherein the tax rule base is configured to receive tax rules and data~~
8 ~~in a markup language format or an electronic data interchange format, thus~~
9 ~~enabling a third party provider, a tax professional, or an end user to enter~~
10 ~~the tax rules and data in a machine readable format without requiring~~
11 ~~programming; and~~
12 wherein the tax rules and ~~the tax~~ data comprise ~~at least a country~~
13 ~~name, a tax regime identifier, a tax identifier, a tax type identifier, and a~~
14 ~~tax jurisdiction identifier~~ ~~tax jurisdiction~~;
15 an external tax service interface means for interfacing to a third party tax
16 service provider to perform tax computations for another local jurisdiction which
17 is simultaneously applicable; and

18 a tax determination manager means for determining ~~a tax for a transaction~~
19 an applicable tax corresponding to at least the tax regime and the tax jurisdiction
20 at a given level of granularity using the tax knowledge base means and the tax
21 rule base means.

1 24. (Original) The means of claim 23, further comprising a tax
2 services request manager means for accessing the tax determination manager
3 means upon receiving a tax request from a registered subscriber.

1 25. (Original) The means of claim 23, further comprising an open
2 subscription means that includes security and access protocols used by the tax
3 services request manager means to control access to the tax determination
4 manager means.

1 26. (Original) The means of claim 23, further comprising a record
2 repository means for storing information relating to tax events and tax status.

1 27. (Currently amended) An apparatus that performs operations that
2 need to be performed to meet the requirements of a local jurisdiction, comprising:
3 an external tax service interface, embodied in a computer system,
4 configured to interface to a third party tax service provider to perform tax
5 computations for another local jurisdiction which is simultaneously applicable
6 a tax service comprising:
7 a number of service components within the tax service, including a tax
8 determination manager and a tax administration manager, wherein the tax
9 determination manager is configured to determine an applicable tax
10 corresponding to at least a tax regime and a tax jurisdiction at a given level of
11 granularity; and

12 a number of utility components within the tax service, including,
13 a geography model,
14 a knowledge base which includes tax data pertaining to tax
15 rates in local jurisdictions, and
16 a tax rule base which includes one or more tax rules for
17 applying taxes in the local jurisdictions,
18 wherein the tax rule base is configured to receive tax rules and data
19 in a markup language format or an electronic data interchange format, thus
20 enabling a third party provider, a tax professional, or an end user to enter
21 the tax rules and data in a machine readable format without requiring
22 programming, and
23 wherein the tax rules and the tax data comprise at least the a
24 country name, a tax regime identifier, a tax identifier, a tax type identifier,
25 and a tax jurisdiction identifier the tax jurisdiction.

1 28. (Previously presented) The apparatus of claim 27, wherein service
2 components can be broken down into a small number of well-defined processes to
3 be executed by a tax service in a specific, pre-determined order to fulfill the
4 requirements imposed by a tax authority of a given local jurisdiction.

1 29. (Previously presented) The apparatus of claim 27, wherein the tax
2 rule base can accept rules for a given process of a service component to achieve a
3 requisite result specified by a tax authority of a local jurisdiction.

1 30. (Original) The apparatus of claim 27, further comprising a tax
2 rules navigator that operates on the tax rule base and returns a result, or a
3 reference to a result, for a process of a service component for a given local
4 jurisdiction.